DOCUMENT RESUME

ED 278 612 SO 017 956

TITLE	Standards for Evaluation of Instructional Materials with Respect to Social Content. 1986 Edition.
INSTITUTION	California State Dept. of Education, Sacramento. Curriculum Framework and Textbook Development Unit.
PUB DATE	86
NOTE	15p.
AVAILABLE FROM	California State Department of Education, P.O. Box 271, Sacramento, CA 95802-0271 ($2.25).
PUB TYPE	Guides - Non-Classroom Use (055) -- Legal/Legislative/Regulatory Materials (090)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Age Discrimination; Attitudes; *Change Strategies; *Cultural Images; *Cultural Pluralism; Elementary Secondary Education; Ethnocentrism; Expectation; *Instructional Materials; Labeling (of Persons); *Minority Group Influences; Racial Identification; Religious Cultural Groups; *Role of Education; Role Perception; Sex Stereotypes; Social Change; Social Discrimination; Stereotypes
IDENTIFIERS	California Education Code

ABSTRACT

The California Legislature recognized the significant place of instructional materials in the formation of a child's attitudes and beliefs when it adopted "Educational Code" sections 60040 through 60044. The "Education Code" sections referred to in this document are intended to help dispel negative stereotypes by emphasizing people in diverse, positive, and contributing roles. However, "Education Code" sections 60040 through 60044 do not include any references to age, disability, brand names, or nutrition. The standards in these areas represent policies of the State Board of Education and as such must also be considered by those who review for compliance. Policy areas are identified by date of Board approval instead of statutory code sections. Particular coverage is given to Male and Female Roles; Ethnic and Cultural Groups; Older Persons and the Aging Process; Disabled Persons; Entrepreneur and Labor; Religion; Ecology and Environment; Dangerous Substances; Theft, Fire Prevention; and Humane Treatment of Animals and People; Declaration of Independence and Constitution of the United States; Brand Names and Corporate Logos; and Diet and Exercise. Also included are Special Circumstances and Social Content Requirements of the "Education Code." (BZ)

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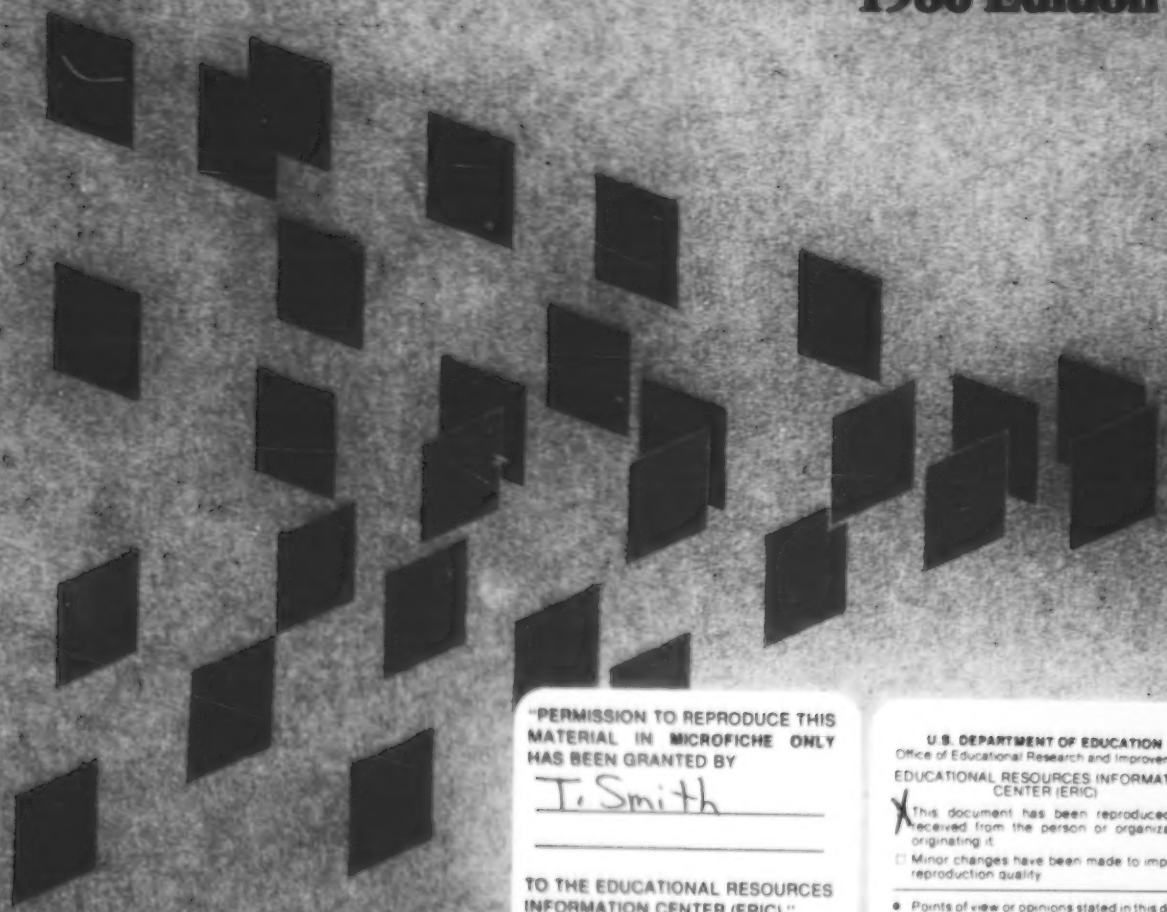
Standards for Evaluation of Instructional Materials with Respect to Social Content

1986 Edition



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CALIFORNIA STATE DEPARTMENT OF EDUCATION
Bill Honig, Superintendent of Public Instruction
Sacramento, 1986

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Standards for Evaluation of Instructional Materials with Respect to Social Content

1986 Edition

Prepared by the
Curriculum Framework and Textbook
Development Unit

Publishing Information

This document, which was approved by the California State Board of Education on January 10, 1986, was prepared by the Curriculum Framework and Textbook Development Unit. The document was edited and prepared for photo-offset production by the Bureau of Publications; published by the California State Department of Education, 721 Capitol Mall, P.O. Box 944272, Sacramento, CA 94244-2720; and distributed under the provisions of the Library Distribution Act and *Government Code* Section 11096.

Copies of this publication are available for $2.25, plus sales tax for California residents, from Publications Sales, California State Department of Education, P.O. Box 271, Sacramento, CA 95802-0271. A partial list of publications available from the Department of Education appears on page 8 of this document. A complete list of publications which are available from the Department, "Selected Publications of the California State Department of Education," may be obtained by writing to the address listed above.

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Foreword

Over the last four years, we have been engaged in a statewide effort to upgrade the quality of textbooks and instructional materials used by California students. Through this effort we have focused on adding a new rigor and accuracy to the material presented and on ensuring that the content of the materials reflects the values, ideals, and positive accomplishments of our society.

It is important that the instructional materials used in our schools portray in a realistic manner those standards promoted in this document: democratic values, cultural pluralism, and the diversity of our population.

We are confident that these revised *Standards for Evaluation of Instructional Materials with Respect to Social Content* will enhance our ability to provide students in this state with high quality textbooks and instructional materials.

DAVID T. ROMERO
President, State Board of Education

BILL HONIG
Superintendent of Public Instruction

Preface

The *Standards for Evaluation of Instructional Materials with Respect to Social Content* have been revised to address pertinent issues and edited to provide clarity and conciseness in interpreting *Education Code* sections 60040—60044 and State Board policy. These standards are intended for use by Legal Compliance Committees in reviewing instructional materials for possible adoption and use in California public schools. The standards may also be used as a guide by publishers in the development of instructional materials and by school districts in reviewing instructional materials.

The Department recognizes the valuable suggestions and input provided by Board member John L. Ward and former Board members Sandra J. Boese and Daniel M. Chernow. Ruth Hadley, Chairperson of the Legal Compliance Committee, and Maritza Giberga, Coordinator of Legal Compliance, are also commended for their work in the revision of this document.

We believe that these standards will provide direction and guidance to publishers, members of the public, and educators in their efforts to foster understanding and respect of all people, regardless of their age, sex, heritage, or handicap.

JAMES R. SMITH
Deputy Superintendent
Curriculum and Instructional Leadership

FRANCIE ALEXANDER
Associate Superintendent and Director, Curriculum, Instruction, and Assessment Division

Standards for Evaluation of Instructional Materials with Respect to Social Content

Research has documented that the interests, prejudices, and ideas children develop as they mature are influenced directly by everything they see and hear. Since much of a child's early development takes place in school, instructional materials used there will contribute to the positive or negative effect of the school experience. The Legislature recognized the vital role of instructional materials in the formation of a child's attitudes and beliefs when it adopted *Education Code* sections 60040 through 60044 (see Appendix).

In addition to providing positive experiences and encouraging aspirations, instructional materials should provide an image of a pluralistic, multicultural society in which any member of any cultural group is looked on as a unique individual. The *Education Code* sections referred to in this document were intended to help dispel the erroneous stereotypes by emphasizing people in diverse, positive, and contributing roles that underscore the society in which we live. Neither *adverse reflections* nor *inappropriate portrayals* should occur in instructional materials to be used by students in California public schools.

Purpose of Standards

The laws as written require that instructional materials portray accurately the cultural and racial diversity and the male and female roles in our society and the contributions of minority groups and males and females to the development of U.S. and California society. These requirements imply that instructional materials must also help students to understand both the historical roles and contributions of women and minorities in other societies, the forces which shaped those roles and contributions, and how and why the contemporary American roles and contributions of women and minorities are different from those at other times and in other cultures.

Many evaluators are needed to review the very large number of instructional materials that are submitted for legal compliance with the various social content requirements specified in the *Education Code*. Evaluators must of necessity apply their individual judgments as to whether materials do in fact comply. The purpose of this document is to provide reasonable, systematic standards on which evaluators may base their judgments, so that the results of the evaluation process will be as consistent and as equitable as possible.

Education Code sections 60040 through 60044 do not include any references to age, disability, brand names, or nutrition. The standards in these areas represent policies of the State Board of Education and as such must also be considered by those who review for compliance. Policy areas are identified by date of Board approval instead of statutory code sections.

Special Circumstances

1. *Literary, historical, and cultural perspectives.* When examining instructional materials for adverse reflection or roles, an evaluator must make a qualitative judgment with respect to classical or contemporary literature (including folktales), music and art, or stories or articles having a particular historical or cultural perspective. In such cases, it may be inappropriate to require complete compliance with these guidelines. What might be considered adverse reflection or failure to portray appropriate roles should be judged in the context of high-quality literary works. Discussion material should be included in the teacher's edition indicating that, although a particular attitude toward women or a minority group was prevalent during a certain period in history, that attitude has changed or is in the process of change.
2. *Reference to humans.* Materials need not include references to human beings. For instance, math problems described solely in abstract terms or stories about animals without human attributes are perfectly acceptable in instructional materials but are outside the scope of these standards. Additionally, materials that contain references to children need not include references to adults, even though this omission may limit the scope of the roles and contributions that can be presented.
3. *Special purpose—limited portrayals.* Several kinds of circumstances make it necessary to modify specified requirements regarding proportion and balance of portrayals. These circumstances do not obviate the need for careful review for adverse reflection or derogatory references, but they do make it difficult to achieve the usual kind of required balance.
   a. *Narrow focus—limited scope and content.* An evaluator must consider the number of characters presented and the relationships among

them; if a material includes only three or four main characters, or if all of the main characters are members of the same family, it will obviously be unrealistic to expect protrayal of a wide diversity of ethnic groups or roles and contributions. If the setting is restricted to a limited locale, such as an inner-city ghetto or a sparsely settled desert region, the possibilities for showing a wide range of socioeconomic groups in a wide range of activities are necessarily limited. Materials with a narrow focus and/or limited portrayals should be clearly identified as such so that no false impressions are conveyed.

b. *Infrequent use.* The materials are designed to be used infrequently—example: a test to be administered only two or three times a year.

c. *Small group.* The materials are part of a small group of materials that are designed for a special purpose—example: an enrichment series of pamphlets with fewer than eight pamphlets per grade level.

d. *Audience.* The intended audience is other than students—example: parents.

e. *Ancillary materials.* These materials are part of the core program but are supportive and auxiliary to the basic program—example: workbooks, test booklets, transparencies, tapes, and slides.

4. *Series.* When conducting a compliance review of a series of instructional materials designed to be used as a basic program, an evaluator must judge each grade level individually, without regard to the content of any other component. However, it is important to consider certain exceptions referred to in "Special purpose" (above).

5. *Teachers' materials.* Evaluators must use these standards for reviewing both students' and teachers' materials. Two considerations are especially important in connection with teachers' material: (1) in no case may instructions in a teacher's edition designed to counteract noncompliant pictures or text in a student's edition be given any weight in the evaluation of the student's edition; and (2) instructions to the teacher for students' activities that could reasonably be expected to cause adverse reflection or represent roles inaccurately must be considered noncompliant even though they are not seen by the student.

Male and Female Roles

Education Code sections 60040(a) and 60044(a)

Purpose. To promote the individual development and self-esteem of each student, regardless of gender.

Method. By portraying people of both sexes in the full range of their human potential in all societal roles.

Applicability of Standards. The standards of adverse reflection and equal portrayal must be complied with in every instance. The remainder of the criteria require compliance where appropriate.

1. *Adverse reflection.* Descriptions, depictions, labels, or rejoinders which tend to demean, stereotype, or patronize males or females because of their sex must not appear.
2. *Equal portrayal.* Instructional materials containing reference to, or illustrations of, people must refer to or illustrate both sexes approximately evenly, in both number and importance, except as limited by accuracy or special purpose.
3. *Occupations.* If professional or executive occupations, parenting, trades, or other gainful employment is portrayed, men and women should be represented equally.
4. *Achievements.* Whenever an instructional material presents developments in history or current events, or achievements in art, science, or any other field, the contributions of women and men should be represented in approximately equal numbers.
5. *Mental and physical activities.* Mentally and physically active, creative, problem-solving roles, and success and failure in those roles, if such roles are depicted, should be divided approximately evenly between male and female characters.
6. *Traditional and nontraditional activities.* The number of traditional and nontraditional activities engaged in by characters of both sexes should be approximately even.
7. *Emotions.* The gamut of emotions—e.g., fear, anger, tenderness—should occur randomly among characters, regardless of gender.
8. *Sexually neutral language.* Such terms as *people, men* and *women, pioneers,* and *they* should generally be used to avoid the apparent exclusion of females or males.
9. *Parenting activities.* Both sexes should be portrayed in nurturing roles with their families. Emphasis should be given to the responsibility of parenting.

Ethnic and Cultural Groups

Education Code sections 60040(b) and 60044(a)

Purpose. To project the cultural diversity of our society, instill in each child a sense of pride in his or her heritage, develop a feeling of self-worth related to equality of opportunity, eradicate the bases of prejudice, and thereby encourage the optimum individual development of each student.

Method. By including a fair representation of majority and minority group characters portrayed in a wide variety of occupational and behavioral roles, including cultural and artistic.

Applicability of Standards. The word *group* as used in these standards refers generally to one of those cultural and social groups named in *Education Code* Section 60040: "American Indians, American Negroes, Mexican Americans, Asian Americans, European Americans, and members of other ethnic and cultural groups." Current federal and state reporting guidelines for affirmative action and other similiar programs use a different type of classification. However, since any racial, ethnic, or cultural groups can be fitted into those listed in the *Education Code*, that code section will remain the basis for implementation of these guidelines.

All of the following standards apply to all instructional materials that depict contemporary U.S. or California society or any unidentifiable society. In addition, standards number 1, 2, and 3 apply to all materials that depict any contemporary society outside the United States, subject to Standard 1 under "Special Circumstances" concerning certain perspectives regarding literature, music, art, history, or other cultures; and Standard 3 concerning certain kinds of limited portrayals.

The standards of adverse reflection and equal portrayal must be complied with in every instance. The remainder of the criteria require compliance where appropriate.

1. *Adverse reflection.* Descriptions, depictions, labels, or rejoinders which tend to demean, stereotype, or patronize minority groups must not occur.
2. *Proportion of portrayals.* Instructional materials containing references to, or illustrations of, people must portray accurately, to the extent possible, the roles and contributions of a fair proportion of diverse ethnic groups, and especially those groups included in the statute (Section 60040(b)).
3. *Customs and life-styles.* When diverse ethnic or cultural groups are portrayed, portrayals must not depict differences in customs or life-styles as undesirable and must not reflect an adverse value of such differences.
4. *Occupations.* If professional or executive roles, trade jobs, or other gainful occupations are portrayed, majority and minority groups should be presented therein in fair proportion.
5. *Socioeconomic settings.* Minority persons should be depicted in the same range of socioeconomic settings as are persons of the majority group.
6. *Achievements.* Whenever developments in history or current events, or achievements in art, science, or other fields, are presented, the contributions of minority people, and particularly the identification of prominent minority persons, should be included and discussed, when historically accurate.
7. *Mental and physical activities.* Mentally active, creative, and problem-solving roles, and success and failure in those roles, should be divided in fair proportion between majority and minority group characters.
8. *Traditional and nontraditional activities.* The portrayal of minority characters engaged in activities which have traditionally been viewed as typical of their culture should be balanced by portrayal of such characters engaged in other less traditionally recognized activities.
9. *Root culture.* Depiction of diverse ethnic and cultural groups should not be limited to their root cultures (traditional activities associated with ancestral culture), but rather must include such groups within the mainstream of U.S. life and must identify them as Americans.

Older Persons and the Aging Process

Approved by the State Board of Education
on July 12, 1979

Purpose. To promote the development of a healthy perception of older people and a concept of the aging process as a natural phenomenon.

Method. By depicting the involvement, activities, and contributions of older persons as a vital part of society.

Applicability of Standards. The standards of adverse reflection and equal portrayal must be complied with in every instance. The remainder of the criteria require compliance where appropriate.

1. *Adverse reflection.* Descriptions, depictions, labels, or rejoinders that tend to demean, stereotype, or patronize older persons must not appear.
2. *Proportion of portrayals.* Instructional materials containing references to, or illustrations of, usual human activities must include older persons, except as limited by accuracy or special purpose.
3. *Roles.* The presentation of older persons in instructional materials should not, except as is necessary to identify them as older persons, be significantly different from the portrayal of people of other age groups.
4. *Aging process.* When it is appropriate, the aging process should be pictured as a continuous process spanning the entire lifetime.

Disabled Persons

Approved by the State Board of Education
on July 12, 1979

Purpose. To promote the development in students of a perception of disabled persons that is clear and undistorted, untinged by fear, distrust, loathing, amusement, ridicule, contempt, or pity.

Method. By depicting the involvement, activities, and contributions of disabled persons as an integral part of society.

Applicability of Standards. The standards of adverse reflection and equal portrayal must be complied with in every instance. The remainder of the criteria require compliance where appropriate.

Evaluators should note that whether a disability is temporary or permanent is of no particular significance. In programs for the disabled, a disability is a disability, regardless of duration.

1. *Adverse reflection.* Descriptions, depictions, labels, or rejoinders which tend to demean, stereotype, or patronize disabled persons must not appear.
2. *Proportion of portrayals.* Instructional materials which depict a broad range of human activities must include some representations of disabled persons, except as limited by special purpose or the need for accuracy.
3. *Roles.* The presentation of disabled persons in instructional materials should not, except as is necessary to identify them as disabled, be significantly different from the portrayal of nondisabled persons.
4. *Emotions.* Materials should not convey the impression that physically disabled people are "different" in their emotions or their ability to love and be loved.
5. *Achievements.* When developments in history or current events, or achievements in art, science, or any other field, are presented, the contributions of disabled persons must be included when it is appropriate and historically accurate to do so.

Entrepreneur and Labor

Education Code sections 60040(c) and 60044(a)

Purpose. To develop in students an unbiased view of the functions of each of these two groups in American society.

Method. By presenting, when appropriate, a balanced picture of the roles of entrepreneurs, managers, and labor, as represented by workers and their organizations, in the American free enterprise system.

Applicability of Standards. The standard of adverse reflection must be complied with in every instance. The remainder of the criteria require compliance where appropriate.

1. *Adverse reflection.* References or labels which tend to demean, stereotype, or patronize any persons engaged in any particular occupation or vocation, whether essentially entrepreneur, management, or labor, must not appear.
2. *Roles.* Accurate reference should be made to the role and contribution of the entrepreneur and labor in the total development of California and the United States.

Religion

Education Code Section 60044(a) and (b)

Purpose. To enable all students to become aware of and accepting of religious diversity while at the same time being allowed to remain secure in any religious beliefs they may already have.

Method. By depicting, when appropriate, the diversity of religious beliefs held in U.S. and California society, as well as other societies, without displaying bias for or against any of those beliefs or against religious beliefs in general.

Applicability of Standards. Since these standards are derived to a degree from the U.S. and the California constitutions, and are closely related to the requirements concerning the portrayal of cultural diversity, they all require strict compliance.

These standards should not be construed to mean that the mere depiction of religion constitutes indoctrination. Religious music and art, for instance, may be included in instructional materials when appropriate.

1. *Adverse reflection.* No religious belief or practice may be held up to ridicule nor any religious group portrayed as inferior.
2. *Indoctrination.* Any explanation or description of a religious belief or practice should be presented in a manner which neither encourages nor discourages belief nor indoctrinates the student in any particular religious belief.
3. *Diversity.* Portrayals of contemporary U.S. society should, where religion is discussed or depicted, reflect its religious diversity.

Ecology and Environment

Education Code Section 60041(a)

Purpose. To develop in all students a sense of responsibility for the protection and improvement, insofar as possible and feasible, of the natural environment of this planet.

Method. By emphasizing, whenever appropriate, issues that relate to ecology and the environment and what ordinary citizens can do to contribute to the resolution of those issues.

Applicability of Standards. This requirement is applicable only "where appropriate." A piece of material could avoid any discussion or portrayal of the kind required by these standards and still comply under this section. It may be silent on these issues *provided* such silence does not positively imply that no problems exist in ecology or the environment.

1. *Ecology.* The interdependence of people and their environment should be represented.

2. *Environmental protection.* Responsibilities of human beings for creation and protection of a healthy environment should be given direct attention.
3. *Resource use.* Wise use of natural resources should be encouraged. In no case should the material depict (except as necessary to illustrate a point), nor encourage, nor condone waste of resources.

Dangerous Substances

Education Code Section 60041(b)

Purpose. To provide to all students knowledge and awareness of what constitutes the various uses and misuses of dangerous substances.
Method. By presenting factual data and realistic values relating to the use and misuse of dangerous substances.
Applicability of Standards. These standards require compliance where appropriate.

1. *Discouragement of use.* The use of tobacco, alcohol, narcotics, or restricted dangerous drugs, except as prescribed by a physician, must not be glamorized or encouraged by illustrations or text.
2. *Hazards of use.* Where references to, or illustrations of, the use of substances are included in other than an incidental manner, such as a passing reference to a character's taking cough medicine, or a classic short story referring to "father's pipe," the hazards of such use should be depicted or pointed out.

Thrift, Fire Prevention, and Humane Treatment of Animals and People

Education Code Section 60042

Purpose. To instill in all students certain basic values, particularly thrift and humane treatment, with fire prevention especially highlighted as a separate aspect of each of these values.
Method. By demonstrating the connection between these values and both everyday and extraordinary occurrences in human living and history.
Applicability of Standards. The negative mandates listed below require compliance in all cases; the positive mandates apply whenever appropriate. When making judgments on these standards, evaluators must consider the vast differences that have existed among different cultures and acceptable standards of humane behavior that existed during different historical periods.

1. *Waste.* Wasteful or wildly excessive behavior must not be encouraged nor glamorized.
2. *Fire hazards.* Practices and situations which constitute fire hazards must not be depicted, except for clarifying a point, nor condoned, nor encouraged.
3. *Inhumane treatment.* Physical abuse of adults, child abuse, violence, or other inhumane or depraved treatment of animals or people must not be depicted, except for purposes of clarifying a point, nor condoned, nor encouraged.
4. *Thrift.* The practice of thrift should be encouraged through illustrations and/or text.
5. *Fire prevention.* Methods of prevention, and fire safety rules in general, should be explained and their use encouraged through illustrations and/or text.
6. *Humane treatment.* Such treatment should be encouraged through illustrations and text, but historical instances of inhumane treatment of people (such as slavery or the Holocaust) should not be omitted or glossed over but should be depicted when appropriate.

Declaration of Independence and Constitution of the United States

Education Code Section 60043

This standard needs to be met only when it is appropriate to the comprehension of students at the level for which the material is designed. In addition, it applies only to instructional materials for social science, history, or civics classes.

1. The Declaration of Independence should be presented.
2. The Constitution of the United States should be included.
3. Patriotism, freedom, and free enterprise will be reviewed in the educational content of textbooks.

Brand Names and Corporate Logos

Approved by the State Board of Education on December 8, 1977

Purpose. To prevent unfair exposure for any privately produced product.
Method. By omission, whenever possible and feasible, of illustrations of, or references to, such private producers or their products.
Applicability of Standards. The two standards in this area require compliance where appropriate. They also require judgment concerning the "educational purpose" of the material or the segment of the materials involved, since "educational purpose" determines how the standards are to be applied.

These standards apply to all instructional materials that depict contemporary U.S. society. In representations of foreign societies, the standards apply to brand names, products, and logos familiar to the average American who has *not* traveled abroad.

1. *Use of any such depictions.* Instructional materials shall not contain illustrations of any identifiable

commercial brand names, products, or corporate or company logos unless such illustrations are necessary to the educational purpose of the instructional material and that purpose cannot be achieved without using such illustrations, or unless such illustrations are incidental to a scene of a general nature (example: Times Square, New York City).

2. *Prominent use of any one depiction.* These exceptions aside, if a brand name, representation, or company logo is illustrated, prominence shall not be given to any one brand or company unless, in turn, such illustration is necessary to the educational purpose of the instructional material and that purpose cannot be achieved without using such illustration (example: a Coca Cola sign in a foreign country, demonstrating social influence of American corporations abroad).

Diet and Exercise

Approved by the State Board of Education
on January 10, 1986

Purpose. To accustom students to seeing and dealing with representations of nutritious foods and to foster a positive attitude toward exercise.

Method. By emphasizing, when appropriate, foods of high nutritive value and regular exercise.

Applicability of Standards. The standards for this area require compliance when appropriate. They do not constitute an absolute prohibition against portrayal of foods of low nutritive value and the absence of exercise, but rather deal with the application of emphasis.

The relationship of diet and exercise to the overall health and well-being of children is well documented. So that children can attain optimal physical and mental development, a variety of opportunities to learn about good nutrition and exercise should be available. Instructional materials should provide appropriate reinforcement in *illustration* and *content*. Illustrations of foods in instructional materials should emphasize the selection of a variety of nutritious foods which are low in fat, salt, and sugar and high in fiber. Foods which contribute little other than calories should be minimized.

Appendix

Social Content Requirements of the *Education Code*

Portrayal of Cultural and Racial Diversity

60040. When adopting instructional materials for use in the schools, governing boards shall include only instructional materials which, in their determination, accurately portray the cultural and racial diversity of our society, including:

(a) The contributions of both men and women in all types of roles, including professional, vocational, and executive roles.
(b) The role and contributions of American Indians, American Negroes, Mexican Americans, Asian Americans, European Americans, and members of other ethnic and cultural groups to the total development of California and the United States.
(c) The role and contributions of the entrepreneur and labor in the total development of California and the United States.

Ecological Systems; Use of Tobacco, Alcohol, Drugs, and Other Dangerous Substances

60041. When adopting instructional materials for use in schools, governing boards shall include only instructional materials which accurately portray, whenever appropriate:

(a) Man's place in ecological systems and the necessity for the protection of our environment.
(b) The effects on the human system of the use of tobacco, alcohol, narcotics, and restricted dangerous drugs as defined in Section 11032 of the Health and Safety Code, and other dangerous substances.

Thrift, Fire Prevention, and Humane Treatment of Animals and People

60042. When adopting instructional materials for use in the schools, governing boards shall require such materials as they deem necessary and proper to encourage thrift, fire prevention, and the humane treatment of animals and people.

Declaration of Independence and Constitution of the United States

60043. When adopting instructional materials for use in the schools, governing boards shall require, when appropriate to the comprehension of pupils, that textbooks for social science, history, or civics classes contain the Declaration of Independence and the Constitution of the United States.

Prohibited Instructional Materials

60044. No instructional materials shall be adopted by any governing board for use in the schools which, in its determination, contain:

(a) Any matter reflecting adversely upon persons because of their race, color, creed, national origin, ancestry, sex, or occupation.
(b) Any sectarian or denomination doctrine or propaganda contrary to law.

Publications Available from the Department of Education

This publication is one of over 600 that are available from the California State Department of Education. Some of the more recent publications or those most widely used are the following:

Academic Honesty (1986)	$2.50
Administration of Maintenance and Operations in California School Districts (1986)	6.75
Apprenticeship and the Blue Collar System: Putting Women on the Right Track (1982)	10.00
Bilingual-Crosscultural Teacher Aides: A Resource Guide (1984)	3.50
Boating the Right Way (1985)	4.00
California Private School Directory	9.00
California Public School Directory	14.00
California Schools . . . Moving Up: Annual Status Report, 1985 (1986)	3.00
Career/Vocational Assessment of Secondary Students with Exceptional Needs (1983)	4.00
College Core Curriculum: University and College Opportunities Program Guide (1983)	2.25
Computer Applications Planning (1985)	5.00
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85-113 CR 813134 4-86 3M